

Vermont Department of Education
MEDICAL RECORDS SPECIALIST
 (CIP: 51.0716)

Occupational Skills

The Student demonstrates the specified level of competency in occupational skills:

0	1	2	3	4
No Exposure	Introduced	Practiced	Entry-level	Competency

0 1 2 3 4

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|--------------|-----------|---|
| 00000 | A. | Supervising and Training
(Vermont Standards: 1.3, 1.5, 1.6, 1.8, 1.13, 1.15, 1.18, 1.19, 1.20, 1.21, 1.22, 2.4, 2.11, 2.14, 3.1) |
| 00000 | B. | Scheduling
(Vermont Standards: 1.3, 1.5, 1.6, 1.8, 1.13, 1.15, 1.18, 1.19, 1.20, 1.21, 1.22, 2.4, 2.11, 2.14, 3.1) |
| 00000 | C. | Implementing and Performing Communication Functions
(Vermont Standards: 1.3, 1.5, 1.6, 1.8, 1.13, 1.15, 1.18, 1.19, 1.20, 1.21, 1.22, 2.4, 2.11, 2.14, 3.1) |
| 00000 | D. | Providing Patient Services
(Vermont Standards: 1.6, 1.13, 1.21, 2.2, 3.3, 5.18) |
| 00000 | E. | Processing Records
(Vermont Standards: 1.3, 1.5, 1.6, 1.8, 1.13, 1.15, 1.18, 1.19, 1.20, 1.21, 1.22, 7.17, 7.19) |
| 00000 | F. | Maintaining Inventory
(Vermont Standards: 1.3, 1.5, 1.6, 1.8, 1.13, 1.15, 1.18, 1.19, 1.20, 1.21, 1.22, 7.17, 7.19) |
| 00000 | G. | Filing
(Vermont Standards: 1.3, 1.5, 1.6, 1.8, 1.13, 1.15, 1.18, 1.19, 1.20, 1.21, 1.22, 7.17, 7.19) |
| 00000 | H. | Providing Financial Services
(Vermont Standards: 1.21, 1.22, 2.2, 2.5, 7.17, 7.19, 7.6) |
| 00000 | I. | Accounting Services
(Vermont Standards: 1.21, 1.22, 2.2, 2.5, 7.17, 7.19, 7.6) |
| 00000 | J. | Duplicating and Assembling Documents
(Vermont Standards: 1.21, 1.22, 2.2, 2.5, 7.17, 7.19, 7.6) |
| 00000 | K. | Performing Computer Hardware Operations
(Vermont Standards: 1.10, 1.13, 1.21, 1.22, 5.18, 7.18) |
| 00000 | L. | Implementing Medical Terminology
(Vermont Standards: 1.3, 1.5, 1.6, 1.8, 1.13, 1.15, 1.18, 1.19, 1.20, 1.21, 1.22, 7.17, 7.19) |
| 00000 | M. | Providing Data Entry Operations
(Vermont Standards: 1.10, 1.13, 1.21, 1.22, 5.18, 7.18) |

- 00000 N. **Maintaining Medical Records**
(Vermont Standards: 1.10, 1.13, 1.21, 1.22, 5.18, 7.18)
- 00000 O. **Performing Transcription Activities**
(Vermont Standards: 1.10, 1.13, 1.21, 1.22, 5.18, 7.18)
- 00000 P. **Applying Word Processing Concepts**
(Vermont Standards: 1.10, 1.13, 1.21, 1.22, 5.18, 7.18)
- 00000 Q. **Managing Computer Files**
(Vermont Standards: 1.10, 1.13, 1.21, 1.22, 5.18, 7.18)
- 00000 R. **Performing Related Functions**
(Vermont Standards: 1.10, 1.13, 1.19, 1.21, 1.22, 5.18, 7.18)
- 00000 S. **Active Records**
(Vermont Standards: 1.10, 1.13, 1.19, 1.21, 1.22, 5.18, 7.18)
- 00000 T. **Performing Clerical Functions**
(Vermont Standards: 1.10, 1.13, 1.19, 1.21, 1.22, 5.18, 7.18)

DIRECTIONS

Evaluate the student by checking the appropriate box to indicate the degree of Competency. The rating for each task should reflect **employability readiness** rather than the grades given in class.

Rating Scale:

- 0 No exposure**
- 1 Introduced-** the student has been exposed through non participatory instruction (e.g. lecture, demonstration, field trip, video).
- 2 Practiced-** the student can perform the task with direct supervision.
- 3 Entry-Level Competency-** the student can perform the task with limited supervision and/or does not perform the task to standard (a typical entry-level performance expectation).
- 4 Competency-** the student consistently performs task to standard with no supervision (on at least two occasions or at instructor's option).

MEDICAL RECORDS SPECIALIST

GENERAL SKILLS

0 1 2 3 4

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A. Supervising and Training

- *A.001 Demonstrate use of equipment.
- *A.002 Arrange for office equipment repairs.
- *A.003 Prepare a job description.
- *A.004 Orient new employees.
- *A.005 Update procedure manual, office manual, or policy book for employees.

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B. Scheduling

- *B.001 Record office appointments.
- *B.002 Arrange conferences.
- *B.003 Make travel plans.
- *B.004 Maintain physician's on-call schedule.
- *B.005 Schedule medical staff appointments or activities.
- *B.006 Schedule hospital admissions, outpatient surgery, and ancillary testing.

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C. Implementing and Performing Communication Functions

- *C.001 Communicate via telephone.
- *C.002 Prepare correspondence for mailing.
- *C.003 Keep telephone log.
- *C.004 Make copy on copy machine.
- *C.005 Transcribe dictation.
- *C.006 Prepare transparencies.
- *C.007 Process in-coming mail.
- *C.008 Process mail through postage machine.
- *C.009 Prepare packages for shipping.
- *C.010 Process output for distribution or mailing.
- *C.011 Distribute output to proper location or files.
- *C.012 Operate FAX machine to transfer information.

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D. Providing Patient Services

- *D.001 Assist patient to complete registration forms.
- *D.002 Complete admitting forms.
- *D.003 Complete discharge forms.
- *D.004 Receive patients.

- *D.005 Obtain emergency medical assistance for patients.
- *D.006 Complete insurance forms.
- *D.007 Compile patient abstracts for insurance inquiries.
- *D.008 Arrange for extended patient services.

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E. Processing Records

- *E.001 Compile daily patient census.
- *E.002 Complete patient change of address procedures.
- *E.003 Key data in computer terminal.
- *E.004 List entry into birth or death registry.
- *E.005 Complete incident report form.
- *E.006 Complete legal document procedures.
- *E.007 Complete personnel insurance record.

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F. Maintaining Inventory

- *F.001 Order supplies and equipment.
- *F.002 Store office equipment and supplies.
- *F.003 Schedule custodial or maintenance services.
- *F.004 Inventory office supplies and equipment.
- *F.005 Receive office supplies and equipment.
- *F.006 Requisition office equipment.
- *F.007 Requisition office supplies.

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G. Filing

- *G.001 Establish cross-reference index.
- *G.002 Maintain filing system.
- *G.003 Retrieve filed material.
- *G.004 Maintain classified files.
- *G.005 Update patient chart record.
- *G.006 Keep tickler file.

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H. Providing Financial Services

- *H.001 Accept payment on account.
- *H.002 Balance day sheet.
- *H.003 Bill patient for medical services.
- *H.004 Process past-due accounts.
- *H.005 Make bank deposit.
- *H.006 Open new patient account.
- *H.007 Reconcile bank statement.

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I. Accounting Services

- *I.001 Process accounts payable invoice.
- *I.002 Make journal entries.
- *I.003 Reconcile journal.
- *I.004 Complete balance sheet.
- *I.005 Compile summary statement.
- *I.006 Post entries from journals to ledgers.
- *I.007 Maintain petty cash fund.

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J. Duplicating and Assembling Documents

- *J.001 Collate printed reports.
- *J.002 Duplicate documents.
- *J.003 Secure individual pages of the document together.
- *J.004 Place individual documents together to form part of the patient's file.

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K. Performing Computer Hardware Operations

- *K.001 Replace ribbon in dot matrix printer.

- *K.002 Replace toner cartridge in laser printer.
- *K.003 Operate a computer terminal.
- *K.004 Utilize a digital/cassette voice recorder for transcribing.
- *K.005 Use printers connected to computer system.
- *K.006 Clean CRT screen and keyboard.

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L. Implementing Medical Terminology

- *L.001 Utilize basic medical terminology grammar on patient charts.
- *L.002 Use anatomy and physiology terminology.
- *L.003 Input medical terminology in the patient's files.
- *L.004 Input terminology of classification, etiology and treatment of diseases.
- *L.005 Utilize operating room terminology for transcribing patient charts.
- *L.006 Use nursing terminology in the transcription process.
- *L.007 Utilize geriatric terminology.

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M. Providing Data Entry Operations

- *M.001 Key agendas.
- *M.002 Transcribe minutes of meetings.
- *M.003 Key manuscripts.
- *M.004 Key financial statements.
- *M.005 Key from recorded media.
- *M.006 Key a letter.
- *M.007 Prepare statistical reports.
- *M.008 Type a medical report.
- *M.009 Maintain office equipment.
- *M.010 Compose copy to be keyed.

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N. Maintaining Medical Records

- *N.001 Transcribe reports for medical records.
- *N.002 Enter information into computer terminal.
- *N.003 Retrieve from computer terminal.
- *N.004 Code diagnosis and surgical procedures.
- *N.005 Close patient records.

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O. Performing Transcription Activities

- *O.001 Retrieve dictation from transcriber.
- *O.002 Transcribe dictation.
- *O.003 Use resources to clarify dictation.
- *O.004 Utilize templates and macros.
- *O.005 Edit transcription.
- *O.006 Sort, distribute and/or communicate document.

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P. Applying Word Processing Concepts

- *P.001 Enter text into the computer system.
- *P.002 Verify text.
- *P.003 Revise text.
- *P.004 Assemble text.
- *P.005 Merge text and data.
- *P.006 Store and retrieve documents.

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Q. Managing Computer Files

- *Q.001 Maintain files.
- *Q.002 Prioritize jobs.
- *Q.003 Review and edit files.
- *Q.004 Maintain records and logs of transcription files.
- *Q.005 Route jobs to transcribing terminals.
- *Q.006 Insure security of transcription material.

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R. Performing Related Functions

- *R.001 Maintain medical ethics.
- *R.002 Conduct inventory control for supplies and materials.
- *R.003 Demagnetize cassette tapes for reuse.

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S. Active Records

- *S.001 Code records for filing.
- *S.002 Cross reference records.
- *S.003 Sort records for filing.
- *S.004 File records.
- *S.005 Retrieve records from files in an office.
- *S.006 Prepare out-guides for records taken temporarily from files.
- *S.007 Charge-out records upon request.
- *S.008 Follow-up overdue records.

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T. Performing Clerical Functions

- *T.001 Compose correspondence.
- *T.002 Type correspondence.
- *T.003 Transcribe recorded dictation into medical records.
- *T.004 File alphabetically.
- *T.005 File phonetically.
- *T.006 File numerically.
- *T.007 Take/record/transcribe minutes of a meeting.